

# Data Migration Planning

Managing Information for Office 365

8-10-2015

# Data Migration - Introduction

## Universal Data Accessibility

With the County moving to Office 365 there is a need to have critical business data universally accessible to the staff that uses it.

From the Office 365 perspective this means in the Cloud either in OneDrive or SharePoint team sites

# Data Migration - Planning

Office 365 online versions of the Word, Excel and PowerPoint products look to cloud based areas for files such as OneDrive and SharePoint and are unable to access files on either the computer desktop 'C' drive or local server based drives such as 'S', 'V' and 'U'.

The OneDrive for Business desktop agent coupled with the OneDrive cloud enables staff to move files from their 'C' and 'U' drives into the cloud. Once in OneDrive cloud the files can be used by the Office 365 online versions of Word, Excel and PowerPoint.

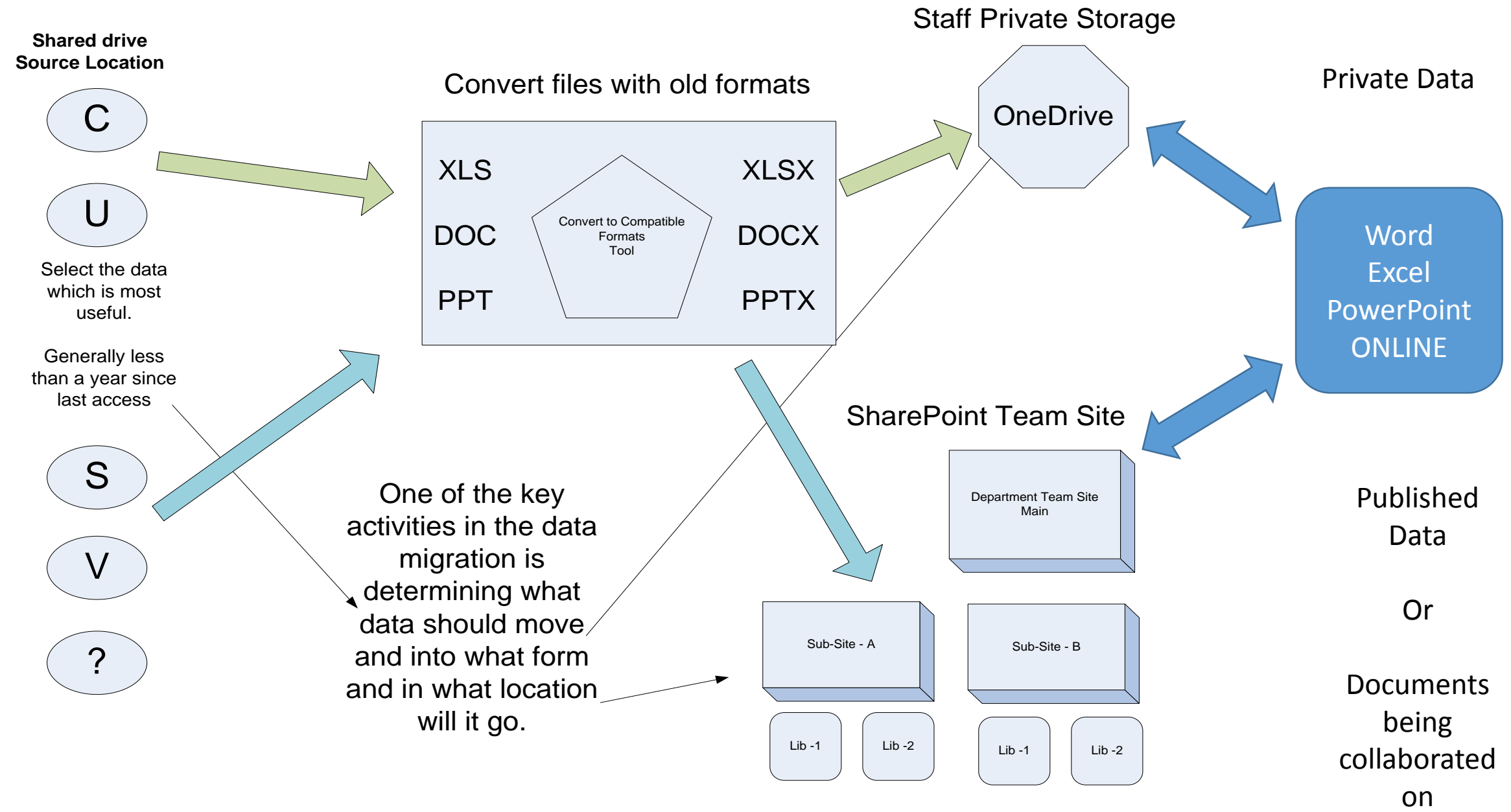
Using the SharePoint 2013 online version, DTS deploys team sites for each department. These team sites coupled with libraries and sub sites enables staff the those departments to create and manage the environments needed to reconcile the 'S' and 'V' drive files.

Having all data cloud based is helpful for any staff that may need to access a file from a remote location

# Data Migration –SharePoint vs Shared Drives

- Data needs to be in the cloud to be universally accessible
- Potential compliance issues with public record legislation
- Data hard to find or inaccessible (need VPN access)
- No formal version control

# Data Migration – Where data should be relocated



# Data Migration –Roles

• Site Owner	Create	Read	Update	Delete	Admin
• Creator	Create	Read	Update		
• Editor	Read	Update			
• Viewer	Read				

# Data Migration - Permissions

- Inherited
  - Can be synched with main site or sub site
  - Should use AD (email enabled) groups
- Separate
  - For special situation
  - Would use SharePoint permissions
- Determine those needed for Team Site members
  - Look at current 'S' drive AD security structure for ideas
  - Use security structures that work, revamp the members
  - Determine specific roles for contributors
  - Create data analysis (CRUD) diagram / site map

# Data Migration - Information Management

- Using sub sites
  - If there are separate groups in the department which require their own restricted access
  - These sites do not need to be built out (just a place to hold libraries)
  - Sub-sites can inherit or have their own permissions
- Libraries within sites
  - Can be libraries or lists
  - If a library needs special metadata for all files it contains
  - If there are special permissions needed for access
- Determine which data is to be moved
  - Determine which data is needed the soonest (don't worry you can add more later)
  - Who are the contributors and what files do they work on (all internal, internal / external)
  - Published data and who accesses it (all, sub site, specific groups)



## Definition:

Metadata is the structured knowledge  
that we have about things we collect.

Yale Descriptive Metadata Best Practices

# Data Migration – Metadata General Basic Questions

- What is it
- What is it called
- Who made it
- What is it about
- When was it made (how old)
- Who may use it
- What language is it in
- Who published it (or produced it)
- Where is it?
- How big is it
- What is it made of

# Data Migration – **Minimum** – Metadata Effort

Users can perform basic searches and filtering

This minimum level should allow things to be incorporated meaningfully into a collection. Descriptions that meet this level can be discovered and used more readily than those things that are barely citable.

A minimum description would tell

- What kind of thing it is
- What it is called
- Where it is
- Who may use it

# Data Migration – **Medium** – Metadata Effort

More advanced functions such as browse and group search results

This medium level allows the user more advanced options for discovery, browsing, sorting, etc. Elements in this level represent a level of detail some might not have for legacy collections. A medium description would tell more by adding to the minimum such information as

- More specifics about what kind of thing it is
- Some description of it
- What it is about (if applicable)
- What language it is in (if applicable)
- Links to images of it or recordings of it (if applicable)
- A unique machine-operable identifier

# Data Migration – **Full** – Metadata Effort

Users can perform precise searches, sorting, etc.

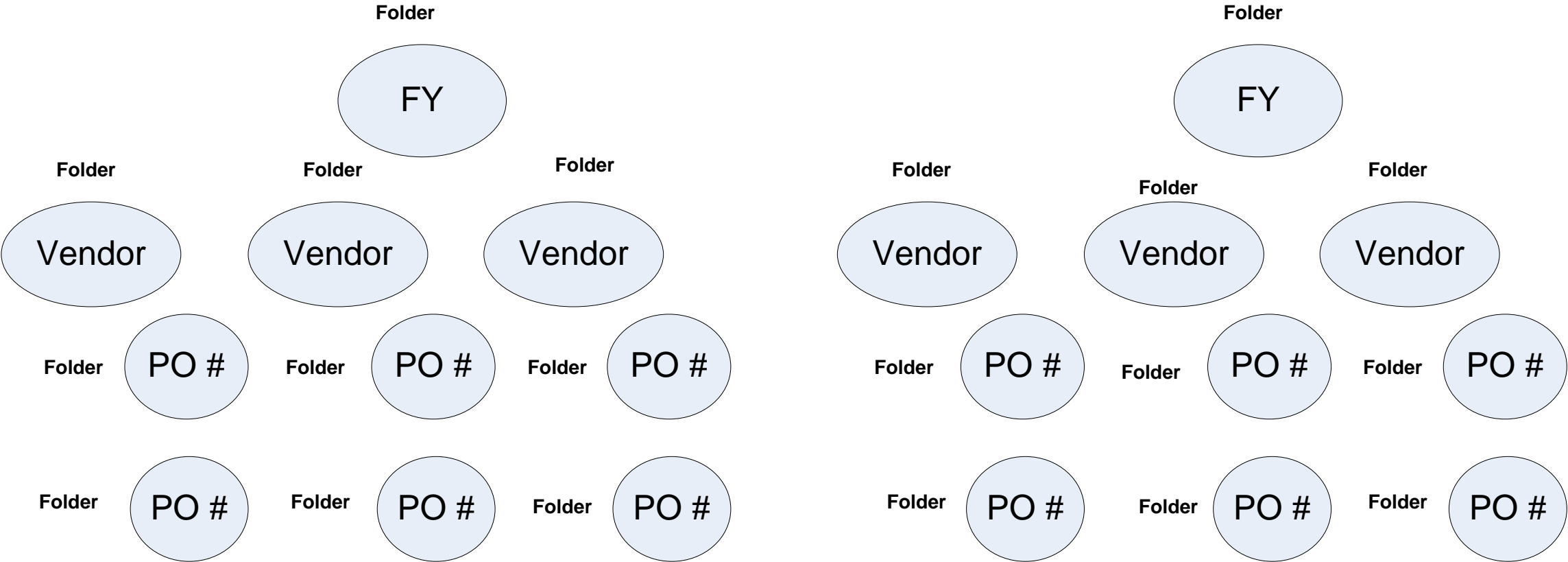
This full level allows users more functionality. Meeting this level allows the introduction of very precise searching capabilities across a wide variety of resources and allows a user to make a final evaluation as to whether the resource is relevant to his or her needs.

A full description would tell more by adding to the medium such information as

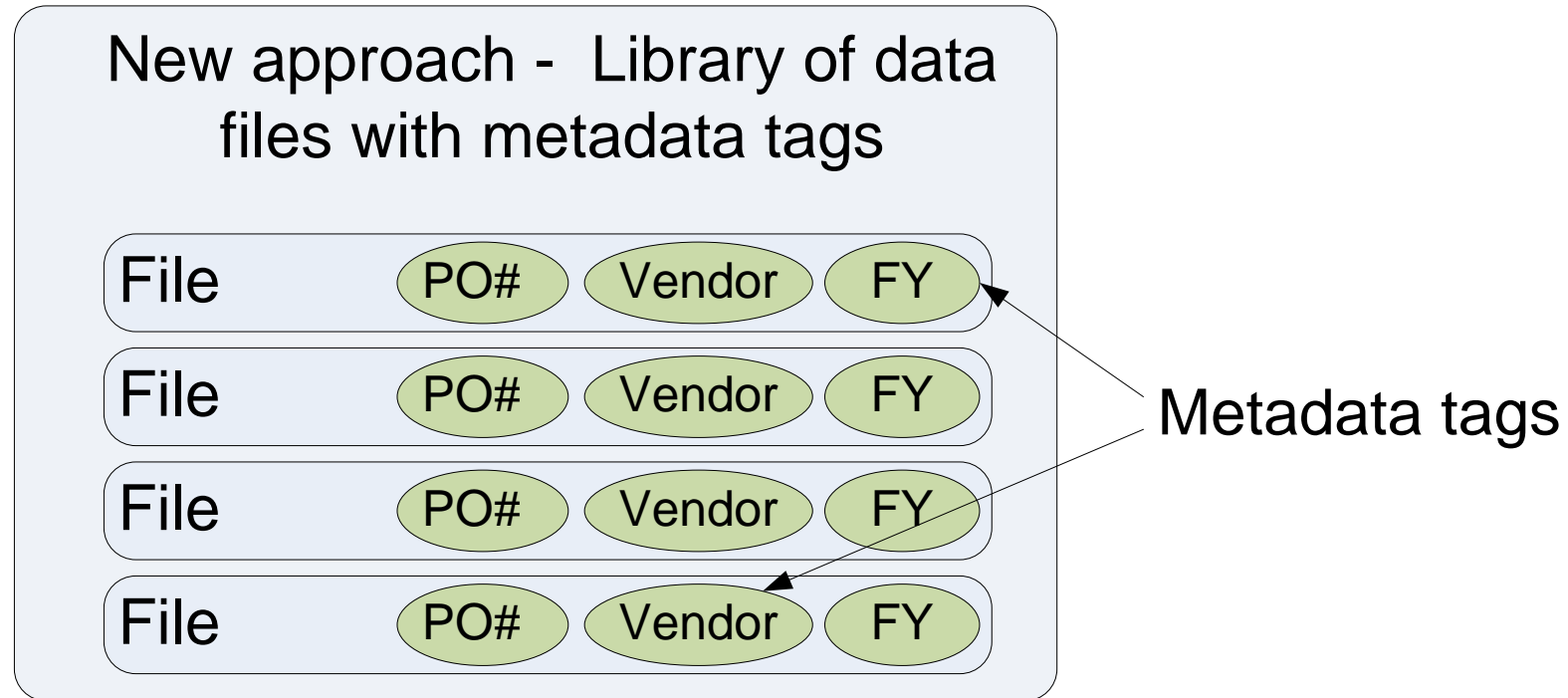
- What roles various people may have had with making it
- A detailed description of it
- An abstract or summary
- Its relationships with other things
- Precise terms or codes regarding what it is about

# Data Migration – Improving file structures – AS IS

Old data model ('S' drive)



# Data Migration – Improving file structures – TO BE



Can create / store views displaying different criteria such as 'all POs from Vendor x'

# Data Migration – Moving files

- Unless G3 - Always convert
  - XLS – XLSX
  - DOC - DOCX
  - PPT – PPTX
- Move the most important / most frequently used first
  - Functional data owners need to determine
  - Can always move more later
- Can move files without adding metadata at first



# Data Migration - Acceptable file type examples

- Acceptable File Types
  - Recommended
    - XLSX                      PDF
    - DOCX                    (others)
    - PPTX
    - VSD
  - Not recommended
    - .WAV                      PST
    - .MOV                      Access DB
    - .MP4
  - Microsoft blocked

# Data Migration – Take Aways

- Data needs to be in the cloud to be universally accessible
- Take the opportunity to ‘clean house’ on the ‘S’ drive
- Bring only the files you really need to operate
  - Can bring more over if you ever you need to
- Use the power of the search and views
- Use efficiency tools such as travel reimbursement

# Reference

# Data Migration – Team Site – Sample Layout

Sample Team Site Layout (Generic)									
		Team Site Home	Sub-Sites (per AD)	Helpful/Useful Links					
<b>Home</b>  <b>Reference</b> <ul style="list-style-type: none"> <li>• Policy</li> <li>• Procedures</li> </ul> <b>Operations</b> <ul style="list-style-type: none"> <li>• Forms</li> <li>• Tracking</li> </ul> <b>Libraries</b> <ul style="list-style-type: none"> <li>• History</li> <li>• Transactional</li> </ul> <b>Information</b> <ul style="list-style-type: none"> <li>• Department News</li> <li>• Events / Deadlines</li> </ul>		<div> <div>How do I find?</div> <div>Calendar</div> <div>???</div> <div>???</div> </div>							

# Microsoft Blocked 1 of 5

- |         |                                     |           |  |
|---------|-------------------------------------|-----------|--|
| • .ade  | Microsoft Access project extension  | • .class  | Java class file                          |
| • .adp  | Microsoft Access project            | • .cmd    | Windows NT command script                |
| • .app  | Application file                    | • .cnt    | Help Contents file                       |
| • .asa  | ASP declarations file               | • .com    | Microsoft MS-DOS program                 |
| • .ashx | ASP.NET Web handler file.           | • .config | Configuration file                       |
| • .asmx | ASP.NET Web Services source file    | • .cpl    | Control Panel extension                  |
| • .asp  | Active Server Pages                 | • .crt    | Security certificate                     |
| • .bas  | Microsoft Visual Basic class module | • .csh    | Script file                              |
| • .bat  | Batch file                          | • .der    | DER Certificate file                     |
| • .cdx  | Compound index                      | • .dll    | Windows dynamic-link library             |
| • .cer  | Certificate file                    | • .exe    | Program                                  |
| • .chm  | Compiled HTML Help file             | • .fxp    | Microsoft Visual FoxPro compiled program |

# Microsoft Blocked 2 of 5

- |           |                                    |         |                                   |
|-----------|------------------------------------|---------|-----------------------------------|
| • .gadget | Windows Gadget                     | • .jse  | JScript Encoded script file       |
| • .grp    | SmarterMail group file             | • .json | JavaScript Object Notation file   |
| • .hlp    | Help file                          | • .ksh  | Korn Shell script file            |
| • .hta    | HTML program                       | • .lnk  | Shortcut                          |
| • .htr    | Script file                        | • .mad  | Shortcut                          |
| • .htw    | HTML document                      | • .maf  | Shortcut                          |
| • .ida    | Internet Information Services file | • .mag  | Shortcut                          |
| • .idc    | Internet database connector file   | • .mam  | Shortcut                          |
| • .idq    | Internet data query file           | • .maq  | Shortcut                          |
| • .ins    | Internet Naming Service            | • .mar  | Shortcut                          |
| • .isp    | Internet Communication settings    | • .mas  | Microsoft Access stored procedure |
| • .its    | Internet Document Set file         | • .mat  | Shortcut                          |

# Microsoft Blocked 3 of 5

- |                |                                 |            |   |
|----------------|---------------------------------|------------|---|
| • .mau         | Shortcut                        | • .msc     | Microsoft Common Console document             |
| • .mav         | Shortcut                        | • .msh     | Microsoft Agent script helper                 |
| • .maw         | Shortcut                        | • .msh1    | Microsoft Agent script helper                 |
| • .mcf         | Multimedia Container Format     | • .msh1xml | Microsoft Agent script helper                 |
| • .mda         | Microsoft Access add-in program | • .msh2    | Microsoft Agent script helper                 |
| • .mdb         | Microsoft Access program        | • .msh2xml | Microsoft Agent script helper                 |
| • .mde         | Microsoft Access MDE database   | • .mshxml  | Microsoft Agent script helper                 |
| • .mdt         | Microsoft Access data file      | • .msi     | Windows Installer package                     |
| • .mdw         | Microsoft Access workgroup      | • .msp     | Windows Installer update package file         |
| • .mdz         | Microsoft Access wizard program | • .mst     | Visual Test source files                      |
| • .ms-one-stub | Microsoft OneNote stub          | • .ops     | Microsoft Office profile settings file        |
|                |                                 | • .pcd     | Photo CD image or Visual Test compiled script |
|                |                                 | • .pif     | Shortcut to MS-DOS program                    |

# Microsoft Blocked 4 of 5

- |            |  |          |  |
|------------|--|----------|--|
| • .pl      | Perl script                            | • .rem   | ACT! database maintenance file                 |
| • .prf     | System file                            | • .scf   | Windows Explorer command file                  |
| • .prg     | Program source file                    | • .scr   | Screen saver                                   |
| • .printer | Printer file                           | • .sct   | Script file                                    |
| • .ps1     | Windows PowerShell Cmdlet file         | • .shb   | Windows shortcut                               |
| • .ps1xml  | Windows PowerShell Display config file | • .shs   | Shell Scrap object                             |
| • .ps2     | Windows PowerShell Cmdlet file         | • .shtm  | HTML file that contains server-side directives |
| • .ps2xml  | Windows PowerShell Display config file | • .shtml | HTML file that contains server-side directives |
| • .psc1    | Windows PowerShell Console file        | • .soap  | Simple Object Access Protocol file             |
| • .psc2    | Windows PowerShell Console file        | • .stm   | HTML file that contains server-side directives |
| • .pst     | Microsoft Outlook personal folder file | • .svc   | Windows Comms Foundation (WCF) service file    |
| • .reg     | Registration entries                   | • .url   | Uniform Resource Locator (Internet shortcut)   |



# Microsoft Blocked 5 of 5

- .vb Microsoft Visual Basic Scripting Edition file
- .vbe VBScript Encoded Script file
- .vbs VBScript file
- .vsix Visual Studio Extension
- .ws Windows Script file
- .wsc Windows Script Component
- .wsf Windows Script file
- .wsh Windows Script Host settings file
- .xamlx Visual Studio Workflow service file

# Make the leap

